Appendix G – Tourism

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12 GTEC CONCLUSIONS

The following paragraph was extracted from GTEC report (NM 1995b). These conclusions represent the finding of the Tourism Assessment Committee.

SPACEPORT TOURISM

Tourism experience at existing space-related facilities was reviewed to estimate the potential new tourism drawn by the SRS. The Kennedy Space Center, Houston Space Center, Cape Canaveral, Edwards AFB, and Vandenberg AFB were considered. Their experience indicates that manned launches are far more popular than unmanned launches (and in both cases, visitor centers do not recapture their costs of operation). The Alamogordo Space Center has good attendance based on well-curated exhibits of historical artifacts and film shows. The SRS would be at a relative disadvantage because it would not be near other major tourist attractions, as KSC is to Disney World, it would feature unmanned launches with poor accessibility to viewing sites, and launch schedules would be uncertain. An optimistic scenario of 1000 visitors per major launch, 12 launches per year, would yield perhaps $3 million in local tourist expenditures. Specific figures used in this estimate are outlined in Appendix E.

13 SUPPORTING DATA

The following extract is the appendix from the GTEC report (NM 1995b) that provides substantiating data regarding the anticipated levels of visitor activity at the SRS.

APPENDIX E

TOURISM ASSESSMENT COMMITTEE

I. VISITORS TO SPACE-RELATED LOCAL AREA ATTRACTIONS

A. Alamogordo Space Center - 190k per year (White Sands National Monument - 550k per year)

B. White Sands Missile Range - fewer than 5k per year

C. Space Murals - fewer than 8k per year

II. VISITORS TO NATIONAL SPACE ATTRACTIONS

A. Kennedy Space Center (15,000 per Shuttle launch -120,000 per year - limited)

B. Space Center Houston - 700k per year

C. Edwards Air Force Base (Shuttle landing - 2,000 per landing)

D. Alabama Space Center - 500k per year, 20k per year to Space Camp

E. Kansas Cosmosphere - 350k per year

F. Cape Canaveral - Patrick AFB for ELV launch

1. 1,000- 5,000 for large ELV launch (high percentage invited)
2. 300 - 500/day visit USAF missiles museum

G. Vandenberg Air Force Base-ELV 20 - 500 invited guests/launch; 100–200 roadside spectators

III. NATIONWIDE TYPICAL DATA POINT

A. Most museums/visitor centers recapture only 25% - 35% of their operating budget, notwithstanding construction costs; also rely on private or public funding for balance.

IV. SPACE CENTER HOUSTON EXAMPLE

A. World-class, heavily advertised, year-round facility, professionally engineered specifically for tourists

B. Construction cost $75M, mostly privately funded

C. Professional estimates of attendance 3 x optimistic

1. Disney explanation for estimation error: Houston is not a major tourist destination, tourists do not plan trip primarily to see the Space Center, whereas tourists do travel to Orlando specifically to go to Disney World, may plan vacation around Shuttle launch.

D. 1994 Annual Revenues, approximately $12M; operations and debt service, approximately $19M

1. Initial attendance 1.5 × break-even; in 3 years diminished to 1/2 break-even

V. TOURIST ACCOMMODATIONS

Good tourist accommodations are expensive, and no spectator facility at any current launch site comes close to recapturing facility operating costs.

A. For example, Kennedy Space Center provides:

1. 10 full-time Public Affairs personnel
2. Car passes and mission/facility information packets for more than 120,000 visitors/year
3. Parking for 10,000 vehicles
4. Parking and roadway lighting for visitor locations (typical early dawn launches)

5. Parking guides, security, and medical/emergency personnel
6. Public address systems for mission countdown and commentary
7. Viewing stands and restrooms
8. Food, drink, souvenirs, postal services

VI. FACTORS AFFECTING ATTENDANCE AT LAUNCH EVENTS

A. Newness of program
B. National publicity
C. Manned/unmanned
D. Size of launch vehicle
E. Nearness to launch pad
F. Dangerous/controversial mission
G. Accessibility and amenities at view site
H. Season
I. Availability of multiple other nearby entertainment attractions

VII. PROBABLE GENERAL PUBLIC TOURIST ASSESSMENT OF SPACEPORT LAUNCH ATTRACTIVENESS

A. Poor accessibility - many miles detour from Highway 1-25, far from typical tourist destination cities and airports
B. Meager amenities at view site without major expenditures
C. Experimental nature of program makes launch schedules uncertain, frequently delayed
D. Relatively few nearby entertainment attractions
E. Unmanned missions only
F. Relatively small vehicles reduce launch spectacle
G. Safety forces distant viewing location
H. High initial interest expected to dwindle with subsequent program maturity

VIII. SPACEPORT ATTRACTIONS OTHER THAN LAUNCH

A. Installation initially would have little history or artifacts, so not much to put in a visitor center
B. Actual launch and vehicle preparation facilities not likely to be open to the public

C. Therefore, minimal visit appeal except for launch occasions

IX. INVITED LAUNCH GUESTS ARE A MAJOR FACTOR

A. 90 percent of spectators at large, unmanned ELV launch are invited VIPs (corporate executives, marketing, PAO, major engineering and manufacturing personnel, sponsors, payload and vehicle representatives and families, etc.)

B. 30 percent of spectators at Shuttle launches are invitees

C. Guest expenses typically paid by employer

1. VIP visitor tends to spend more time, more money than self funded tourist
2. Typical stay: two days; one night for single event

X. OTHER LOCAL ATTRACTIONS WOULD BENEFIT INDIRECTLY

A. Availability of spaceport launch viewing opportunity enhances tourist attractiveness of local area as a whole

1. Alamogordo (town and Space Center), White Sands National Monument, White Sands Missile Range, and Las Cruces (maybe even El Paso area) would benefit from people attracted by increased spectrum of potential activities in general area, takes an extra day to see it all, stay overnight, etc.

XI. TOURIST SPENDING

A. Typical family of four spends average (1995 dollars) of $160 per day (food, lodging, gas, entertainment, etc.)

B. Typical single visitor spends average of $90 per day (1995 dollars)

C. Expenditure rollover/trickle-down multipliers range from 3 to 7

XII. OPTIMISTIC EXAMPLE

A. 1,000 out-of-area visitors per major vehicle launch, family size 1.5

B. 12 launches per year

C. Two-day; one night stay in local area

D. Actual expenditures per visit is approximately $200 to $300 per family, could total $2.5 million to $3.5 million per year

E. Tourist dollar "rollover effect" could range from $7 million to $15 million per year

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